

STUDENT FINANCIAL ASSISTANCE  
MODERNIZATION PARTNER

Appendix VI. MONTHLY MODERNIZATION PROGRAM SCORECARDS  
STATUS AS OF MAY 31, 2001

# MODERNIZATION PARTNER PROGRAM SUMMARY

	CFO								Financial Partners	Schools Channel			Students Channel	Organizational Transformation					
	TO 25 - Electronic Document Management (EDM)	TO 35 - FMS Applications Operations	TO 45 - Financial Management System (FMS)	TO 61 - CFO Transformation	TO - 46 Technical Architecture Support (ITA Release 2)	TO 47 - CMM Assessment	TO 53 - Ombudsman Operations	TO 65- Electronic Master Promissory Note Project Support	TO 50 - Financial Partners Data Mart	TO 43- Schools Portal Operations	TO 64 - Common Origination and Disbursement	TO 70 - eCampus Based	TO 42- FAESA on the Web Redesign	TO 29 - SFA University Mod Support	TO 31 - SFA University Front-to-Back	TO 36 - LMS	TO 60 - Students Organizational Support	TO 62 - HR Modernization	TO 67 - Employee Development Center
Page	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
Overall	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Scope	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Task Order	Yellow	Green	Green	Yellow	Green	Yellow	Green	Yellow	Green	Green	Yellow	Yellow	Green	Green	Yellow	Green	Green	Yellow	Yellow
Schedule Performance Against Work Performed	Green	Green	Yellow	Green	Green	Green	Green	Green	Yellow	Green	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Yellow
Architecture	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Risk	Green	Green	Yellow	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green
Quality	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Communication/ Change Management	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Human Resources	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Commercial Off the Shelf Software (COTS)	Green	Green	Yellow	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Government Dependencies	Green	Green	Red	Green	Green	Green	Green	Green	Yellow	Green	Yellow	Green	Green	Green	Green	Green	Green	Yellow	Yellow

The Bi-Weekly Scorecard Assessment Criteria is located on the last page of the packet.

Comments are not included for measures assessed as "Green" unless additional information needs to be communicated. Please see the Assessment Criteria on the last page of this report for an explanation of the "Green" assessment criteria for each measure.

## Program Level Key Messages:

Modernization Partner FMS team is experiencing ongoing difficulty in resolving issues between the SFA Channels and the legacy contractors. These issues have continued to affect the Direct Loan, DCS, and the Pell teams. SFA does not have an official agreement with the Department of Education CFO regarding interfacing FMSS with FMS. The final definition of the interface is an ongoing issue, since a Memorandum of Understanding (MOU) has not been signed. The team is continuing to work on scheduled tasks under the assumption that the Department of Education will sign the MOU. If a signed MOU can not be obtained in a timely manner the FMS team will elevate the issue to the COO for resolution.

The COD team requires support from legacy contractors to meet their 5/31/01 EAI Proof of Concept milestone. Additionally, the Requirements Development process has been extended until 6/15/01 to fully incorporate all legacy systems functions (LOS & RMS) into COD. Preliminary designs have been initiated with the existing requirements to minimize the impact of the delay on the overall development timeline. The Common Record translation to XML formats is nearly complete but may cause a 2 week delay in demonstrating the EAI record translation, but this is not an overall COD schedule critical path item.

## Note:

The Government Dependencies category was added in May 2001 to clearly highlight areas where SFA assistance is required.

## TO 25 - Electronic Document Management (EDM)

Planned Go Live Date: TBD

ITR: Bill Walsleben

SFA Contact: Cheryl Queen

Modernization Partner Contact: Bill Walsleben

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The team has completed the requirements gathering portion of work.
Green	Green	Scope	Efforts are underway in support of the following deliverables: - ERM Business Case - Imaging Vendor Selection Report - Document Imaging Strategy and Procedures - File Plan - V1 - SFA Record Control Schedule
Yellow	Yellow	Task Order	The Task Order is being updated to reflect the change in scope from an EDM system to an ERM system. The revised Business Case was approved at the 5/17/01 DSG meeting, and will be presented at an upcoming IRB meeting.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	OpenText has been recommended as the ERM product.
NA	Green	Government Dependencies	

# TO 35 - FMS Applications Operations

Go Live Date: FMS went live 10/01/00

ITR: Phill Thomas

SFA Contact: Paul Stonner

Modernization Partner Contact: Tom Schweikert

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The Operations team is progressing with tasks identified in the workplan.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	Operating Oracle Financials COTS.
NA	Green	Government Dependencies	

# TO 45 - Financial Management System (FMS) Phase 3

Go Live Date: 8/1/01

ITR: Bill Walsleben

SFA Contact: Paul Stonner

Modernization Partner Contact: Francesca Keating

April 30 Assessment	May 18 Assessment	Measure	Comments
Yellow	Yellow	Overall	All of the implementation teams are on schedule with the exception of Direct Loan and Interim Payment Process.
Green	Yellow	Scope	The Department of Education has announced that its go-live date for FMSS will change from 8/01 to 10/01. The team plans to complete SFA FMS deliveries by 8/01 and to be available to support the Department of Education's integration testing and parallel operations. The FMSS go-live date has not yet been firmly established, and there is a strong likelihood that the scope of FMS work will be impacted. The FMS team will closely monitor the situation, and notify SFA and Modernization Partner Leadership when the impacts become clear.
Yellow	Green	Task Order	
Green	Yellow	Schedule Performance Against Work Performed	Milestones are behind schedule for the Interim Payment Process and Direct Loan Servicing efforts. The teams are currently taking steps to recover lost time.
Yellow	Green	Architecture	
Green	Yellow	Risk	Potential Scope risks have been identified and assessed. Mitigation plans are in place.
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Yellow	Commercial Off the Shelf Software (COTS)	Discussions are ongoing with Oracle to settle current SFA license obligations and to establish plans for meeting future requirements under an enterprise-wide arrangement.
NA	Red	Government Dependencies	Modernization Partner is experiencing ongoing difficulty in resolving issues between the SFA Channels and the legacy contractors, which have continued to affect the Direct Loan, DCS, and the Pell teams. SFA does not have an official agreement with the Department of Education CFO regarding interfacing their FMSS system with SFA FMS. The final definition of the interface is an ongoing issue, since the Memorandum of Understanding (MOU) has not been signed. The team is continuing to work on scheduled tasks under the assumption that the Department of Education will sign the MOU. If a signed MOU can not be obtained in a timely manner the FMS team will elevate the issue to the COO for resolution.

## TO 61 - CFO Transformation (Operations)

Planned Go Live Date: TBD

ITR: Phill Thomas

SFA Contact: Jim Lynch

Modernization Partner Contact: Phill Thomas

April 30 Assessment	May 18 Assessment	Measure	Comments
NA	Green	Overall	An Authorization To Proceed (ATP) was awarded on 5/14/01.
NA	Green	Scope	
NA	Yellow	Task Order	The Task Order will be submitted to Modernization Partner Program Management by 6/1/01.
NA	Green	Schedule Performance Against Work Performed	
NA	Green	Architecture	
NA	Green	Risk	
NA	Green	Quality	
NA	Green	Communication/Change Management	
NA	Green	Human Resources	
NA	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

This is the first Bi-Weekly Scorecard for TO- 61 CFO Transformation (Operations).

## TO 46 - Technical Architecture Support (ITA Release 2)

Planned Go Live Date: TBD

ITR: Phill Thomas

SFA Contact: Ganesh Reddy

Modernization Partner Contact: Alex Leflur

April 30 Assessment	May 18 Assessment	Measure	Comments
NA	Green	Overall	This Task Order is on schedule and no significant issues have been identified.
NA	Green	Scope	
NA	Green	Task Order	
NA	Green	Schedule Performance Against Work Performed	
NA	Green	Architecture	
NA	Green	Risk	All risks have been defined and mitigation strategies are now developed.
NA	Green	Quality	
NA	Yellow	Communication/Change Management	The Change Management approach and strategy for EAI is being developed. The Clear Quest Whitepaper is now complete and the Configuration Management Approach is expected to be completed by 5/25/01.
NA	Green	Human Resources	Continuing to staff open positions. Staffing requests have been unfilled for a short time and are not impacting the schedule.
NA	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

This is the first Monthly Scorecard for TO 46- Technical Architecture Support (ITA Release 2).

# TO 47 - CMM Assessment

Planned Go Live Date: 9/30/01

ITR: Phill Thomas

SFA Contact: Constance Davis

Modernization Partner Contact: Ron Langkamp

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The team is proceeding with scheduled tasks.
Green	Green	Scope	
Yellow	Yellow	Task Order	An Authorization To Proceed has been received and the team is proceeding with scheduled tasks.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Yellow	Green	Risk	The team has developed a risks document to capture risks and identify mitigation strategies.
Yellow	Yellow	Quality	A formal quality plan is being developed and is scheduled to be drafted by 5/31/01.
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	



# TO 53 - Ombudsman Operations

Planned Go Live Date: 4/23/01

ITR: Phill Thomas

SFA Contact: Debra Wiley

Modernization Partner Contact: Tom Schweikert

April 30 Assessment	May 18 Assessment	Measure	Comments
NA	Green	Overall	The Operations team is progressing with tasks identified in the Task Order.
NA	Green	Scope	
NA	Green	Task Order	
NA	Green	Schedule Performance Against Work Performed	
NA	Green	Architecture	
NA	Yellow	Risk	The following fixes and/or enhancements need to be performed on the OCTS 2.0 software: address Assignment Manager stability, apply the email attachment Siebel patch, and address the sadmin password issue. Assignment Manager is the priority and a plan to fix it will be complete by 6/1/01.
NA	Green	Quality	
NA	Green	Communication/Change Management	
NA	Green	Human Resources	
NA	Green	Commercial Off the Shelf Software (COTS)	Operating Siebel COTS.
NA	Green	Government Dependencies	

# TO 65 - Electronic Master Promissory Note (eMPN) Project Support

Planned Go Live Date: 07/02/01

ITR: Kelly Tate

SFA Contact: Neil Sattler/Charlie Coleman

Modernization Partner Contact: Yateesh Katyal

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	Modernization Partner is providing integration support for the eMPN/PIN Site initiative and facilitating the update for its security plan. The FFEL PIN Site standards have been approved by the Deputy Secretary of the Department of Education.
Yellow	Green	Scope	
Green	Yellow	Task Order	The Task Order has not been awarded. Modernization Partner has received an Authority to Proceed from SFA to provide integration support and security assessment for the eMPN site. The Task Order proposal was submitted on 5/16/01.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

## TO 50- Financial Partners Data Mart

Planned Go Live Date: 5/29/01

ITR: Chris Ward

SFA Contact: Anna Allen

Modernization Partner Contact: Nancy Krecklow

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The team successfully deployed the FP Data Mart into production on 5/29/01.
Green	Green	Scope	
Green	Green	Task Order	
Green	Yellow	Schedule Performance Against Work Performed	The team successfully deployed the FP Data Mart into production on 5/29/01.
Yellow	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	Informatica and MicroStrategy products will be implemented for the Data Mart. No application COTS are currently planned.
NA	Yellow	Government Dependencies	SFA is responsible for informing external Financial Partners of the availability of the Data Mart and determining a strategy for providing access.

## TO 43 - School Portal and IFAP Applications Management

Go Live Date: Application Went live 3/7/01

ITR: Phill Thomas

SFA Contact: Colleen Kennedy

Modernization Partner Contact: Tom Schweikert

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The Operations team is progressing with tasks identified in the Task Order.
Green	Green	Scope	
Green	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	COTS is not applicable to this Task Order.
NA	Green	Government Dependencies	

# TO 64 - Common Origination and Disbursement

Planned Go Live Date: 2/2002

ITR: David Marr

SFA Contact: Kay Jacks/Mary Haldane

Modernization Partner Contact: Gene Murphy/Chris Merrill

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Yellow	Overall	Developing a Shared-In-Savings (SIS) proposal for COD. The team is working on Phase III - Requirements Definition and Implementation Planning.
Yellow	Green	Scope	
Yellow	Yellow	Task Order	The COD Technical Volume has been reviewed by SFA. The Statement of Objectives was received from SFA on 5/14/01. The Task Order is expected to be submitted to SFA by 5/31/01.
Green	Yellow	Schedule Performance Against Work Performed	The team requires support from legacy contractors to meet their 5/31/01 EAI Proof of Concept milestone. Funding issues for the EAI Proof of Concept have been resolved. Additionally, the Requirements Development process has been extended until 6/15/01 to fully incorporate all legacy systems functions (LOS & RMS) into COD. Preliminary designs have been initiated with the existing requirements to minimize the impact of the delay on the overall development timeline. The Common Record translation to XML formats is nearly complete but may cause a 2 week delay in demonstrating the EAI record translation; this is not an overall COD schedule critical path item.
Yellow	Green	Architecture	
Green	Green	Risk	EAI schedule on track as required by key COD dependencies. The team is monitoring these issues closely and EAI is part of the weekly COD Steering Committee agenda.
Green	Green	Quality	
Green	Green	Communication/Change Management	Kitty Wooley has been identified as the SFA Outreach Partner.
Green	Yellow	Human Resources	The team has identified the need for a Testing Manager. A complete review of all staffing needs is in process
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Yellow	Government Dependencies	VDC and Legacy System costs require confirmation for successful Business Case development. Modernization Partner briefed SFA on key VDC and Legacy cost drivers on 5/14/01. SFA's has begun to provide assistance in confirming the VDC and the Legacy system costs.

## TO 70 - eCampus Based

Planned Go Live Date: 9/5/01

ITR: David Marr

SFA Contact: Milton Thomas

Modernization Partner Contact: Kerry Trahan

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The project is currently on schedule with the requirements analysis and design work. The project is working under an Authority to Proceed (ATP).
Green	Green	Scope	
Yellow	Yellow	Task Order	The Technical and Cost Proposals were submitted to SFA on 5/18/01.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

# TO 42- FAFSA on the Web Redesign v.6.0

Planned Go Live Date: 01/01/2002

ITR: Martin Renwick

SFA Contact: Jeanne Saunders

Modernization Partner Contact: Chris Paladino

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	Modernization Partner is continuing development of the five core functions for the FAFSA on the Web (FOTW) Redesign application. Enhancements made to the current production application since January 2001 are being communicated to the Modernization Partner team responsible for release 6.0.
Green	Green	Scope	The scope for FOTW 6.0 is known; production enhancements made by the 5.0 team are being incorporated into the requirements.
Yellow	Green	Task Order	A task order modification is being prepared for the Modernization Partner to assume complete responsibility for FOTW 6.0 to go live on 1/1/02.
Green	Yellow	Schedule Performance Against Work Performed	Development and testing activities are on schedule; the five core functions are planned to be complete 6/30/01; additional activities associated with release 6.0 are being incorporated into the overall schedule.
Yellow	Green	Architecture	
Green	Yellow	Risk	Modernization Partner is preparing an impact assessment associated with the scope of release 6.0 which includes Student Access, FAA Access, Instant Messaging, Paper Changes to the FAFSA and Legislative Changes.
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	The Modernization Partner is organized with a development team, a test (unit, integration, performance, usability and system) team, a fix team, a documentation team, SMEs & NCS.
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

## TO 29 - SFA University Modernization Support

Planned Go Live Date: N/A

ITR: Linh Nguyen

SFA Contact: Anne Teresa

Modernization Partner Contact: Howard Weitzner

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The project is proceeding on schedule.
Yellow	Green	Scope	
Yellow	Green	Task Order	
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	



# TO 31- SFA University Front 2 Back

Planned Go Live Date: 5/15/01

ITR: Linh Nguyen

SFA Contact: Anne Teresa

Modernization Partner Contact: Laura Miller

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The Front 2 Back course materials have been completed and the Front 2 Back course was launched on 5/15/01.
Green	Green	Scope	
Green	Yellow	Task Order	A modification to the Task Order has been submitted to the COTR for approval.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

## TO 36 - LMS

Planned Go Live Date: N/A

ITR: Linh Nguyen

SFA Contact: Anne Teresa

Modernization Partner Contact: Howard Weitzner

April 30 Assessment	May 18 Assessment	Measure	Comments
NA	Green	Overall	The TO has been awarded and work is progressing on schedule.
NA	Green	Scope	
NA	Green	Task Order	The Task Order was awarded 5/17/01.
NA	Green	Schedule Performance Against Work Performed	
NA	Green	Architecture	
NA	Green	Risk	
NA	Green	Quality	
NA	Green	Communication/Change Management	
NA	Green	Human Resources	
NA	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

This is the first Monthly Scorecard for TO 36- LMS.

## TO 60 - Students Organizational Support

Planned Go Live Date: N/A

ITR: Martin Renwick

SFA Contact: Mary K. Muncie

Modernization Partner Contact: Kristine Y. Eelkema

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The Task Order has been signed and the project is achieving milestones on schedule.
Green	Green	Scope	
Green	Green	Task Order	A modification to the Task Order was submitted to SFA for approval on 5/14/01. The modification includes deliverable date changes and a no cost scope and date change for the following deliverables: 60.2.1- Students Credit Management Organizational Roles & Responsibilities, 60.2.2- Student Aid Awareness Program Management and 60.2.1- Customer Profile/Consumer Intimacy Form. Students Credit Management Organizational Roles & Responsibilities. The increased scope resulted in an extension of the period of performance to 10/31/01.
Green	Green	Schedule Performance Against Work Performed	
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Green	Government Dependencies	

# TO 62 - HR Modernization

Planned Go Live Date: 9/1/01

ITR: Kelly Tate

SFA Contact: Calvin Thomas

Modernization Partner Contact: Scott Bone

April 30 Assessment	May 18 Assessment	Measure	Comments
NA	Green	Overall	Development of the As-Is Process Flows, the new Performance Development Process (PDP), and the design of the HR Automation platform are progressing on schedule.
NA	Green	Scope	
NA	Yellow	Task Order	Before the Task Order can be finalized and submitted to SFA, Modernization Partner must receive verification that Jamcracker and Perform.com will integrate. Discussions with senior executives of both vendors took place the week of 5/14/01 and significant progress was made. An agreement should be finalized by 5/25/01.
NA	Green	Schedule Performance Against Work Performed	
NA	Green	Architecture	
NA	Green	Risk	
NA	Green	Quality	
NA	Green	Communication/Change Management	
NA	Green	Human Resources	
NA	Green	Commercial Off the Shelf Software (COTS)	
NA	Yellow	Government Dependencies	SFA Human Resources and the Union are continuing negotiations for acceptance related to the new PDP.

This is the first Monthly Scorecard for TO 62- HR Modernization.

## TO 67 - Career Zone

Planned Go Live Date: N/A

ITR: Linh Nguyen

SFA Contact: Calvin Thomas

Modernization Partner Contact: Amy Rothman

April 30 Assessment	May 18 Assessment	Measure	Comments
Green	Green	Overall	The Task Order is proceeding on schedule.
Green	Green	Scope	
Green	Yellow	Task Order	Modernization Partner is working with Calvin Thomas to make an additional revision to the task order which will include interest-based negotiating support for securing agreements with the Union on the transition program and realignment plan which are critical to Career Zone implementation and success.
Green	Yellow	Schedule Performance Against Work Performed	Modernization Partner is proceeding with scheduled work, however, the Career Counselors are still in place at the Career Zone; therefore career counseling services are not available to SFA employees. Additionally, SFA is experiencing difficulty in procuring courses for the Career Zone due to the contract moratorium. The Career Zone was expected to be fully operational by late summer 2001, but this date may not be achievable. Modernization Partner will continue to monitor progress on all fronts and revise plans as necessary.
Green	Green	Architecture	
Green	Green	Risk	
Green	Green	Quality	
Green	Green	Communication/Change Management	
Green	Green	Human Resources	
Green	Green	Commercial Off the Shelf Software (COTS)	
NA	Yellow	Government Dependencies	The Union has expressed concerns regarding the policies and procedures for employee transition. Full implementation of the Career Zone cannot take place until the Union's concerns are resolved. At this time the Career Zone team is continuing planning and communications, but cannot begin implementation. SFA Human Resources and Union leadership are working to resolve transition concerns. SFA Human Resources and the Union are in the process of creating a draft agreement and a final agreement is expected by late May following review by Jim Keenan (Labor Relations Director of the Department).

**Scorecard Assessment Criteria**

Scorecard Measure/Assessment	Green	Yellow	Red
<b>Overall</b>	<ul style="list-style-type: none"> <li>The Overall Assessment is at the discretion of the individuals completing the scorecard</li> <li>No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project</li> </ul>	<ul style="list-style-type: none"> <li>The Overall Assessment is at the discretion of the individuals completing the scorecard</li> <li>No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project</li> </ul>	<ul style="list-style-type: none"> <li>The Overall Assessment is at the discretion of the individuals completing the scorecard</li> <li>No quantitative guidelines (e.g. 2 Yellows = Overall Yellow) have been issued due to the different nature of each project</li> </ul>
<b>Scope</b>	<ul style="list-style-type: none"> <li>The scope has been defined, requirements are documented and authorized by the SFA and Modernization Partner</li> <li>Formal change control process has been implemented and is maintaining control</li> </ul>	<ul style="list-style-type: none"> <li>The scope has been defined and requirements have been documented and authorized by the SFA and Modernization Partner</li> <li>Material scope issues have not been resolved and/or formal change control process has not been implemented</li> </ul>	<ul style="list-style-type: none"> <li>The scope of the Task Order has not been defined and/or requirements are not documented and authorized by the SFA and Modernization Partner</li> <li>Unforeseen scope growth will impact the schedule baseline</li> <li>Change control process has not been implemented or is not maintaining control</li> </ul>
<b>Task Order</b>	<ul style="list-style-type: none"> <li>Task Order has been accepted</li> </ul>	<ul style="list-style-type: none"> <li>Task Order has not been awarded but ATP has been issued</li> </ul>	<ul style="list-style-type: none"> <li>No Task Order has been awarded</li> <li>No ATP has been issued</li> </ul>
<b>Schedule Performance Against Work Performed</b>	<ul style="list-style-type: none"> <li>Project is achieving milestones on schedule or ahead of schedule</li> </ul>	<ul style="list-style-type: none"> <li>Project may not be meeting milestones, but a catch-up plan has been developed that is accurately reflected in the workplan</li> </ul>	<ul style="list-style-type: none"> <li>Project is not meeting milestones and no catch-up plan has been developed or reflected in the workplan</li> </ul>
<b>Architecture</b>	<ul style="list-style-type: none"> <li>The Project is in full compliance with Modernization Blueprint baseline or target architecture standards or</li> <li>An approved change request for all deviations from the approved architecture exists</li> </ul>	<ul style="list-style-type: none"> <li>The Project is deviating from Modernization Blueprint baseline or target architecture standards or</li> <li>A change request has been submitted but the request has not been approved</li> </ul>	<ul style="list-style-type: none"> <li>The Project is deviating from Modernization Blueprint baseline or target architecture standards or</li> <li>A change request has not been submitted and obtained</li> </ul>
<b>Risk</b>	<ul style="list-style-type: none"> <li>Potential future risks have been identified and assessed; no impact is expected to the other Measures</li> <li>Project risks (if any) to successfully execute the Task Order have been identified, documented and prioritized</li> <li>Risk mitigation strategies are in place</li> </ul>	<ul style="list-style-type: none"> <li>Potential future risks to other Measures have been identified and assessed; impacts are minimal</li> <li>Project risks to successfully execute the Task Order have been documented, but either:                             <ul style="list-style-type: none"> <li>Some risks have not been adequately defined or</li> <li>Mitigation strategies have not been developed for all risks</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Potential future risks to other Measures have been identified and assessed; impacts are significant</li> <li>Project risks to successfully execute the Task Order have not been documented</li> <li>Mitigation strategies have not been developed</li> </ul>
<b>Quality</b>	<ul style="list-style-type: none"> <li>The Project has developed a documented quality plan and is successfully implementing the plan</li> <li>The Project is complying with the requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order</li> </ul>	<ul style="list-style-type: none"> <li>The Project has developed a documented quality plan, but significant problems are preventing successful implementation of the plan, or</li> <li>The project has complied with the quality requirements of the Modernization Partner program plan, appropriate to the work required by the Task Order, however, one or more significant program plan review issues have not been successfully resolved</li> </ul>	<ul style="list-style-type: none"> <li>The Project has not developed a documented quality plan or</li> <li>The project is not complying with the quality requirements of the Modernization Partner program plan appropriate to the work required by the Task Order</li> </ul>
<b>Communication/Change Management</b>	<ul style="list-style-type: none"> <li>Communication and change management strategies are in place and are being implemented</li> </ul>	<ul style="list-style-type: none"> <li>Minor communications issues exist</li> <li>Change management approach and strategy is not complete</li> <li>Information needs of some stakeholders are not being met in a timely manner</li> </ul>	<ul style="list-style-type: none"> <li>Communications issues and change management aspects have not been documented or defined</li> <li>Information needs of stakeholders are not being met</li> </ul>
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>Human resource needs have been documented, approved, and the appropriate resources are available</li> <li>Project team has the individual and group skills needed for the particular phase</li> <li>All staffing requests have been filled or have been unfilled for a short time with no impact to schedule</li> </ul>	<ul style="list-style-type: none"> <li>Human resource needs have been documented</li> <li>Some responsibilities are blurred, minor resource gaps exist and/or team lacks some skills to perform successfully, or</li> <li>Unfilled staffing requests have been open for a period of time and have the potential to impact schedule</li> </ul>	<ul style="list-style-type: none"> <li>Human resource needs have not been documented</li> <li>Serious resource deficiencies exist, significant individual and team skills are lacking, or</li> <li>Staffing requests have remained open for an extended period of time and project schedule has been impacted</li> </ul>
<b>Commercial Off the Shelf Software (COTS)</b>	<ul style="list-style-type: none"> <li>Significant reuse of hardware, software, data, and/or process is being utilized</li> <li>A Reuse review was conducted during conceptual or detailed design and all reuse issues have been resolved</li> </ul>	<ul style="list-style-type: none"> <li>Reuse of Architecture, Design, Hardware, Software, Data and/or Process was considered, used, and candidates were identified, however, none were selected, or</li> <li>A Reuse review was conducted during conceptual or detailed design and issues remain unresolved</li> </ul>	<ul style="list-style-type: none"> <li>Reuse of Architecture, Design, Hardware, Software, Data and/or Process was not considered and candidates were neither evaluated nor used, or</li> <li>A Reuse review was not conducted during conceptual or detailed design</li> </ul>
<b>Government Dependencies</b>	<ul style="list-style-type: none"> <li>No Government Dependencies exist or</li> <li>Government Dependencies have been identified, a mitigation plan has been developed and accepted by SFA and Modernization Partner</li> </ul>	<ul style="list-style-type: none"> <li>Government Dependencies have been identified, a mitigation plan has been developed but has not been accepted by SFA and Modernization Partner</li> </ul>	<ul style="list-style-type: none"> <li>The project has not been evaluated to determine whether there are any Government Dependencies or</li> <li>Government Dependencies have been identified, but a mitigation plan has not been developed</li> </ul>